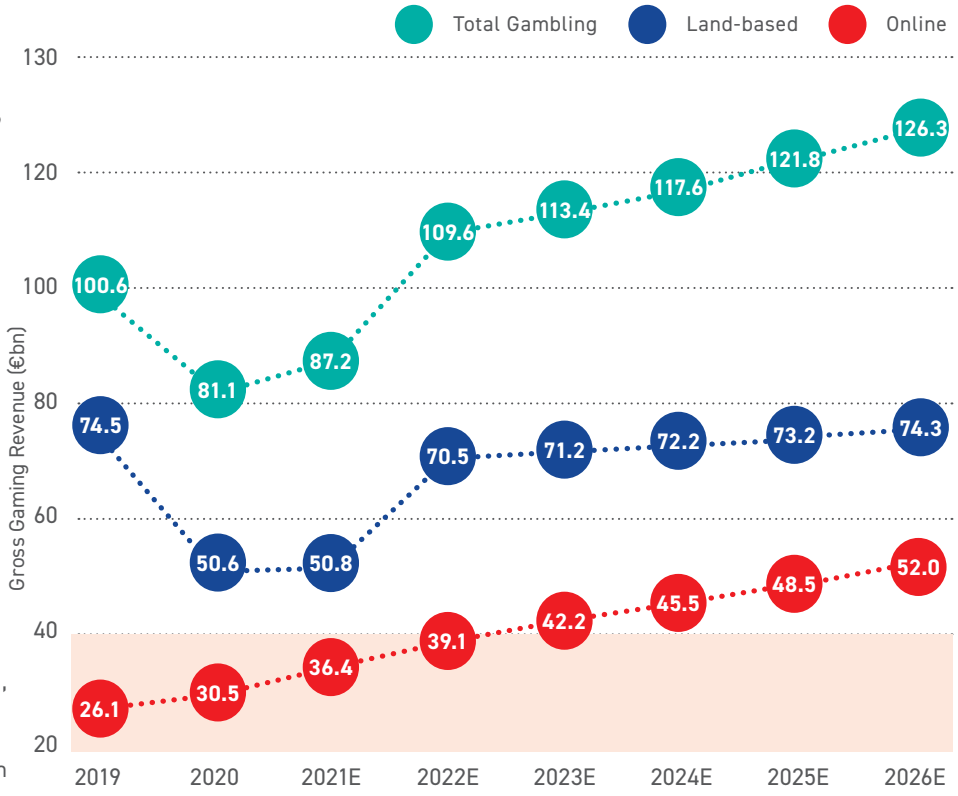
EGBA | European Gaming & Betting Association

European Online Gambling Key Figures 2021 Edition

Gambling market revenue

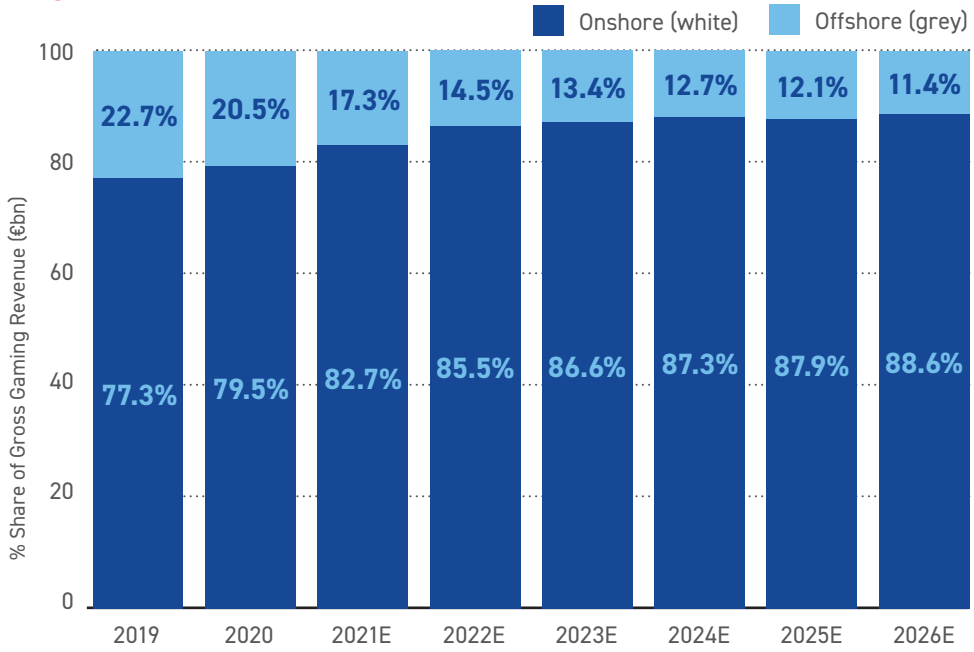
Like in many other sectors, the COVID-19 pandemic led to reduced market revenues in Europe's gambling sector in 2020 and 2021, compared to previous years, and accelerated a pre-existing growth trend of online. In 2021, Europe's total gambling market revenue is expected to be worth €87.2bn in gross gaming revenue, a decrease of 13% compared to the pre-pandemic market in 2019 but representing an increase of 7.5% compared to 2020 levels. In 2021, Europe's online gambling revenue is expected to reach €36.4bn (41.7% of total gambling) gross gaming revenue, an increase of 19% compared to 2020 levels. Meanwhile, land-based gambling revenue is expected to increase marginally to €50.8bn (58.3% of total gambling) gross gaming revenue in 2021, an increase of 0.4% compared to 2020 levels, as the pandemic continues to restrict land-based gambling activity in many European countries.



* Data points may be adjusted due to rounding. ** EU-27 and UK online gambling markets only. Source: H2 Gambling Capital, November 2021, www.h2gc.com

Regulated online gambling market

Regulated online gambling is growing. In 2021, Europe's online gambling market is expected to achieve 82.7% onshore market channelling, meaning that over four fifths of Europe's online gambling activity, by revenue, will take place on gambling websites or apps which are licensed and regulated in the country where the gambling activity took place, while 17.3% of online gambling activity will take place in the offshore market. EGBA believes the biggest driver for the expected increases to Europe's onshore market channelling in 2021 was the opening of the regulated online gambling market in The Netherlands.



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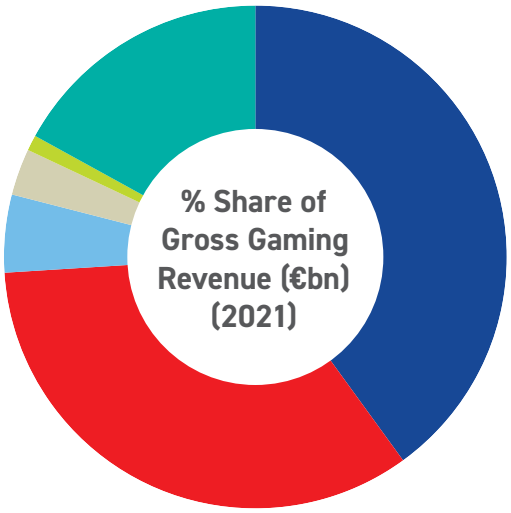
Source: H2 Gambling Capital, November 2021, www.h2gc.com

Most popular online gambling products

Sports and other forms of betting are Europe's most popular online gambling products, expected to be worth €14.64bn and accounting for 40% of Europe's online gross gaming revenue in 2021. Of this, betting on horse racing is expected to be worth €4.88bn (13% of total) online gross gaming revenue, while online betting on sports, such as football, and other types of online betting, such as event betting, are expected to be worth €9.76bn (27% of total) online gross gaming revenue.

Sports and other betting	40%
Casino	34%
Poker	5%
Bingo	3%
Other / Skill Gaming	1%
Lottery	17%



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Online gambling products outlook

	2019	2020	2021E	2022E	2023E	2024E	2025E	2026E
Gross Gaming Revenue (€bn)								
Horseracing	4,0	3,9	4,9	5,2	5,3	5,5	5,6	5,8
Sports / Other	6,7	7,1	9,8	10,5	11,4	12,6	13,6	14,8
Total betting	**10,7**	**11 ,0**	**14,6**	**15,7**	**16,8**	**18,1**	**19,2**	**20,6**
Casino	8,8	11,1	12,4	13,2	14,2	15,1	15,9	16,7
Poker	1,2	1,7	1,7	1,5	1,6	1,6	1,6	1,6
Bingo	1,0	1,1	1,2	1,2	1,2	1,3	1,3	1,4
Other / Skill Gaming	0,3	0,3	0,4	0,4	0,5	0,5	0,6	0,6
Total gaming	**11,3**	**14,3**	**15,6**	**16,4**	**17,5**	**18,5**	**19,5**	**20,4**
Lottery	4,1	5,2	6,1	7,0	7,9	8,9	9,9	11,0
Total online gambling	**26,1**	**30,5**	**36,4**	**39,1**	**42,2**	**45,5**	**48,5**	**52,0**

* Data points may be adjusted due to rounding.
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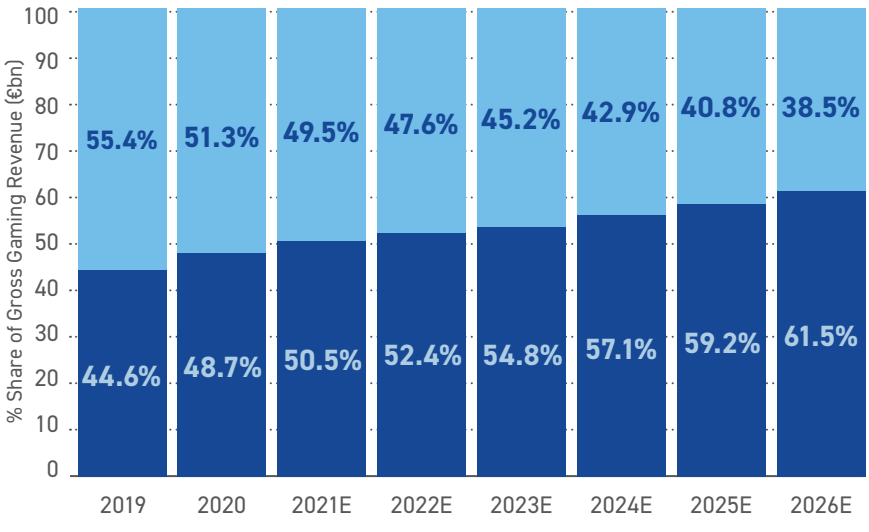
Source: H2 Gambling Capital, November 2021, www.h2gc.com.

Betting devices shares

Online gambling is going mobile. In 2021, the share of online bets from mobile devices (phones and tablets) is expected to take over betting from desktop computers for the first time in Europe, with 50.5% of online bets expected from mobile devices and 49.5% of online bets expected to be placed from desktop. A general shift towards mobile betting is anticipated, with it expected to reach 61.5% of all online bets by 2026.

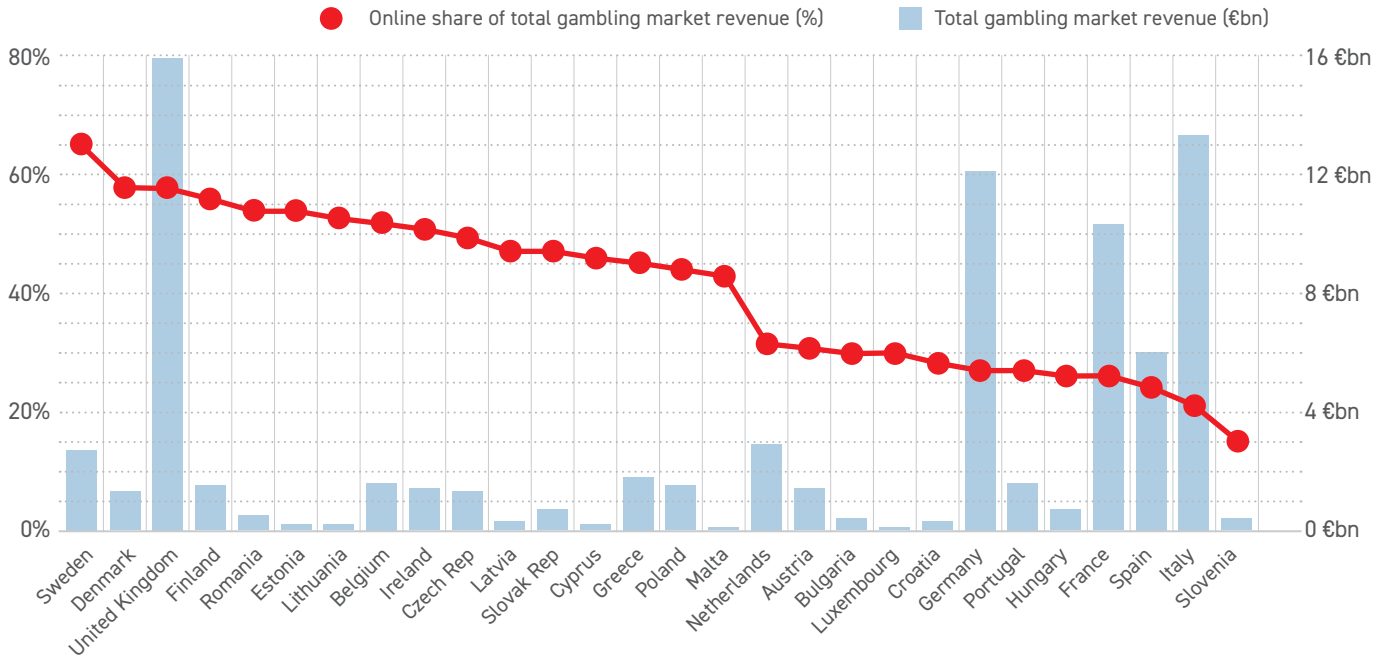


Mobile Devices (phones and tablets only)
Desktop

* EU-27 and UK online gambling markets only.
Source: H2 Gambling Capital, November 2021, www.h2gc.com.

Online gambling shares of national gambling markets (2020)

Significant differences exist in the online shares of the different national gambling markets. In 2020, Sweden was the European country with the highest share (66.2%) of its gambling activity taking place online, followed by Denmark (59.4%), UK (59.3%), Finland (58.5%) and Romania (56.7%). Notably, many of the countries which have larger total gambling markets, by revenue, such as Germany, France, Italy, and Spain, had relatively lower online shares of their gambling markets.



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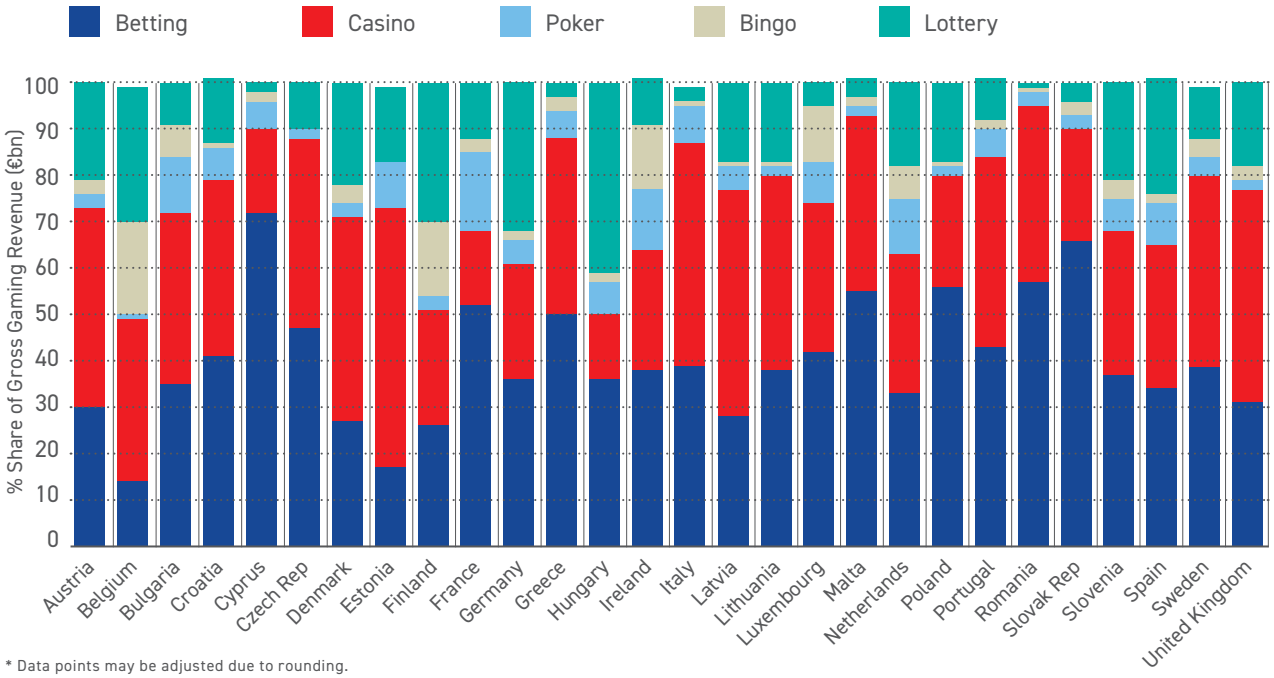
Source: H2 Gambling Capital, November 2021, www.h2gc.com.

Online gambling products shares of national gambling markets (2020)

Significant differences exist in the online gambling product shares of the different national gambling markets. In Cyprus, there is a prohibition on online casino and poker but both products collectively account for 24% of the country's gross gaming revenue (all offshore). In France, there is a prohibition on online casino but online casino accounts for 16% of the country's gross gaming revenue (all offshore).



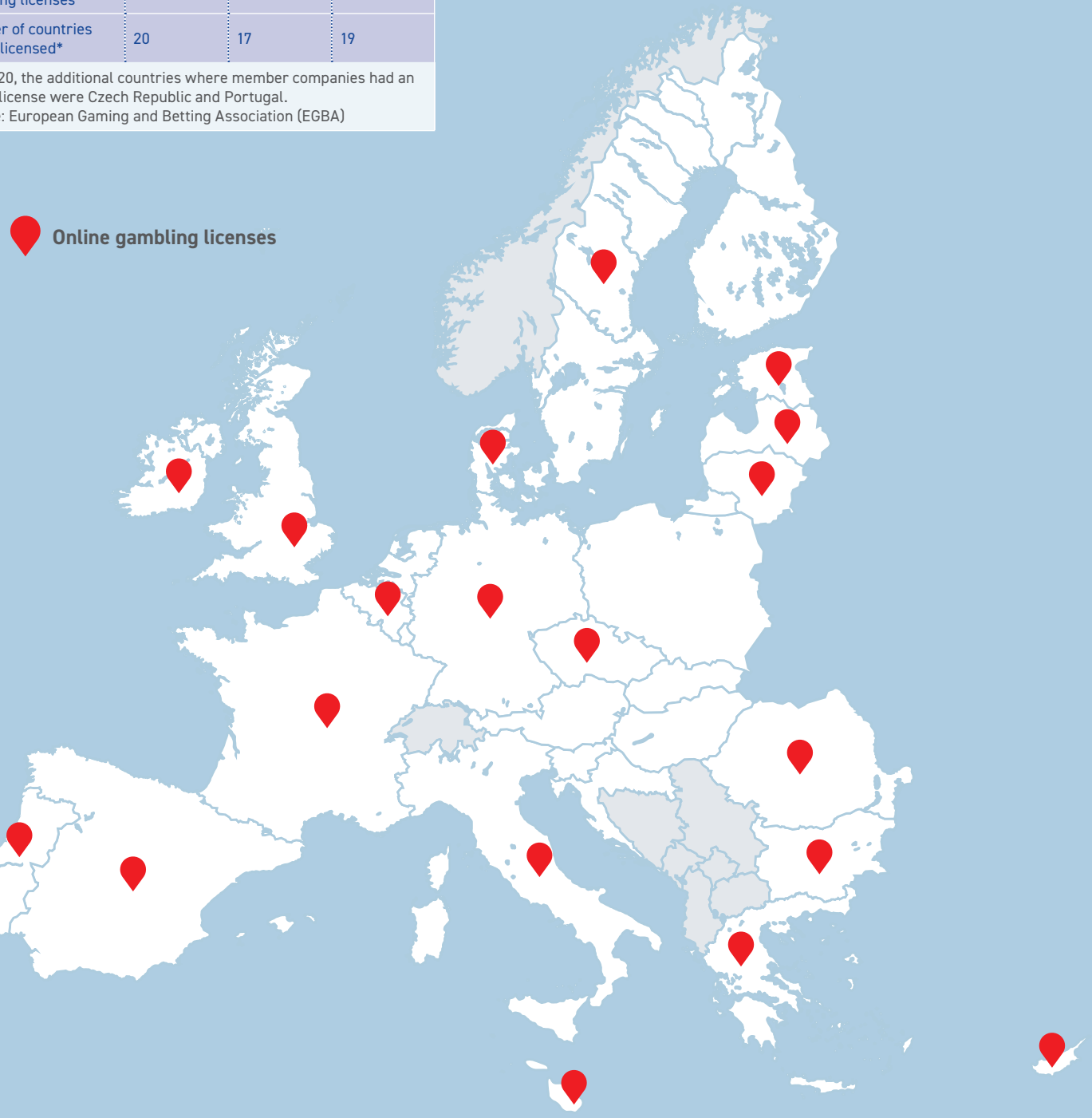
* Data points may be adjusted due to rounding.
** Includes white market data and estimates for grey market.
*** EU-27 and UK online gambling markets only.
Source: H2 Gambling Capital, November 2021, www.h2gc.com.

Disclaimer As a result of rounding, some data points and percentages presented in this document may not add up precisely to the totals provided or the absolute figures.

EGBA members: Key Figures (2020)

Licensing	2018	2019	2020
Number of online gambling licenses	121	145	234
Number of countries where licensed*	20	17	19

* In 2020, the additional countries where member companies had an online license were Czech Republic and Portugal.
Source: European Gaming and Betting Association (EGBA)



EGBA members: Key Figures (2020)

Revenue

	2020 (€bn)
Combined Online Gross Gaming Revenue	10.9
By product	
Sports betting	5.0
Casino	4.6
Poker	0.7
Bingo	0.0
e-Sports	0.1
Other	0.6

* Data points may be adjusted for rounding purposes. ** EU-27 and UK online gambling markets only.
Source: European Gaming and Betting Association (EGBA).

Revenue shares by product

Sports Betting	45.9%
Casino	42.0%
Poker	6.4%
Bingo	0%
E-sports	0.5%
Other	5.1%

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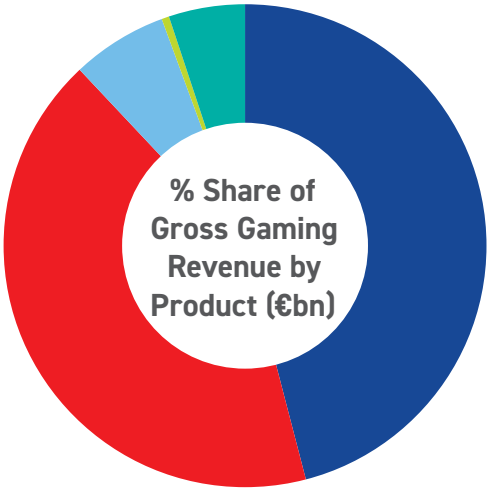


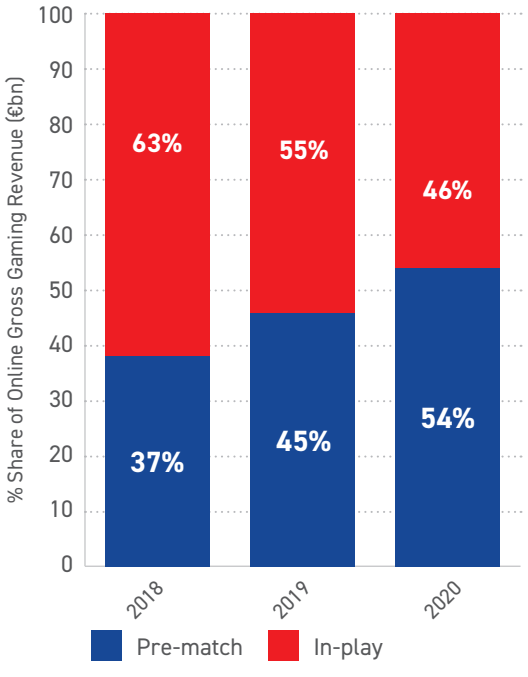
Customers

	2020
Number of active** customer accounts (million)	29.0
Number of customer bets/stakes (billion) (including bonuses)	97.1
Value of customer bets/stakes (€bn) (including bonuses)	179.0
Value of customer winnings (€bn)	168.1

	2018	2019	2020
Return to player (RTP)	93.0%	94.3%	94.0%

* Data points may be adjusted for rounding purposes.
** Customers who placed a bet at least once during the reporting year.
*** EU-27 and UK online gambling markets only.
Source: European Gaming and Betting Association (EGBA).

Sports betting types



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